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# Innovative Transfer Models: From Theory to Practice

*Includes Description of the Transfer Models:  
Flexible Pre-Major  
Descriptive Pathways  
Block Transfer in Applied Programs*

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555 SEYMOUR STREET  
SUITE 709  
VANCOUVER, BC  
V6B 3H6  
CANADA

TEL: 604-412-7700  
FAX: 604-683-0576

EMAIL: [admin@bccat.bc.ca](mailto:admin@bccat.bc.ca)  
WEB: [www.bccat.bc.ca](http://www.bccat.bc.ca)

BRITISH COLUMBIA COUNCIL ON  
**ADMISSIONS & TRANSFER**

SUPPORTING BC'S  
EDUCATION SYSTEM

# **INNOVATIVE TRANSFER MODELS: FROM THEORY TO PRACTICE**

## **Introduction and Background**

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The BC Council on Admissions and Transfer, at its meeting of December 1997, passed two motions designed to move into an implementation phase of what had until then been labeled the Block Transfer Project. These motions described a limited number of initiatives which could be explored by articulation committees or other groups, and which are designed to address transfer difficulties experienced by students and by sending institutions in British Columbia. These difficulties stem in large measure from the increasing complexity of the transfer environment in B.C., which now features 28 public post-secondary institutions, of which half are degree granting.

To address the problems caused by this complexity, the B.C. Council on Admissions and Transfer wishes to encourage the development of flexible and innovative transfer arrangements between B.C. post-secondary institutions. In doing so it recognizes that some necessary constraints operate on student credit transfer, but wishes to minimize where possible inequities and difficulties faced by students and institutions. Council takes the position that students should be able to complete a two-year transfer program at a college, without being disadvantaged by their decision to follow a transfer route to a degree. It believes that any one of the models outlined in this paper has the potential to improve transfer opportunities for students in the B.C. post-secondary system.

The Council also stressed the principle of voluntariness in its motions. Although institutions and committees are free to participate or not as they deem appropriate, the Council hopes all members of the post-secondary system will give due consideration to the need to address transfer problems. The ability of students in B.C. to start their educational program at a college or university college and subsequently transfer relevant credits to a degree granting institution is one of the fundamental elements of B.C. post-secondary education, and is central to accomplishing system goals of access and equity. Where that ability is compromised by the increased complexity of the system, it is essential that we consider flexible and innovative alternatives that could supplement traditional transfer processes and ease transfer problems.

The Council struck two new committees to oversee the implementation of these initiatives. The Associate Degree Review Task Force is undertaking a review of the curriculum requirements of the Associate Degree. The Transfer Innovations Committee will encourage articulation committees or other discipline-based groups, and individual institutions to examine transfer patterns in their disciplines, and to decide whether transfer could be improved or made more flexible by employing one of the models of transfer described in the following pages.

## **1. Flexible Pre-Major Agreements (Academic Programs)**

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### **The Pre-Major**

The pre-major is defined as the requirements (usually expressed as a set of first and second year courses) necessary for acceptance into a major program at the third year level. It most often consists of a list of specific 100 and 200 level courses, set by the department. Occasionally, students are required to acquire a certain number of credits or courses (e.g. “any 9 credits of 200 level courses”) in the discipline or related areas, rather than specific courses.

*Filling the requirements of the pre-major has become the single most problematic area of transfer for academic students.* This was clearly identified in the responses BCCAT received to the Block Transfer discussion paper, and can be ascribed to two main factors. Firstly, all institutions review their programs and update them over time, and all offer specializations based upon departmental philosophy and expertise. This can mean that requirements that were once quite similar across institutions can become widely divergent. Secondly, the university colleges, institutes and newer universities are now developing their degrees and are under pressure to devise unique approaches to majors. British Columbia students are fortunate in that the range and choice of degree options available to them is expanding. This expansion, however, has increased the complexity of the task of sending institutions, which must try to match their curriculum to that of several receiving institutions, or risk disadvantaging their students. Every year BCCAT hears about yet another discipline in which transfer is more difficult than in previous years. These difficulties will increase over the next few years as the emerging degree granting institutions continue to develop new degrees and as the number of students flowing between our institutions also increases. (A recent CEISS report projects an increase of between 7000 and 17000 students in the BC post-secondary system by the year 2001).

### **What is a Flexible Pre-Major Agreement?**

The requirements for the pre-major are set by each department, and are normally the same for all students, whether they entered the institution directly, or arrived there through transfer. If the program requires all students to have say, History 230, then students must have taken that course at that institution, or have received “assigned” transfer credit for it upon transfer to that institution.

In contrast, the idea of the flexible pre-major agreement is to reach an accord on a single set of courses that each receiving institution department would accept **in lieu** of its own specific course requirements. Use of the term “in lieu” is important, rather than the term “equivalent.” *The issue is whether the student with particular academic courses is sufficiently prepared to enter a major program with reasonable prospects of academic success.* Because this is the fundamental concern, another basis for establishing pre-requisites could be an analysis of the necessary knowledge and abilities of the entering

student. Basing requirements on students' knowledge and ability to succeed in subsequent courses opens up the possibility of articulating pre-major requirements more broadly than through a fixed set of courses. This is different from the current practice of many departments of trying to ensure that all students have identical or largely similar courses. Receiving institutions would still set the lower division requirements for direct-entry students, and for students who transfer before completing the courses required under the Flexible Pre-major Agreement.

Within the vast array of academic programs in B.C. institutions, some pre-majors are already quite flexible. For example, in order to major in history at UBC, students are required to have "12 credits from any 100 or 200 level history course." No specific course is listed. This not only allows UBC students to choose their lower level courses freely, but it enables transfer students to fulfill the requirements before transferring. As long as 12 of their credits transfer to UBC as history courses, they are free to choose the courses at their home institution which most interest them.

Other pre-majors are more rigid. For example, SFU's biology department has set their pre-major to include all of: BICH 221 Cell Biology, Bich 222 Molecular Biology, Bisc 101 and 102 Intro Biology, Bisc 202 Genetics, Bisc 204 Ecology, Chem 121 and 122 General Chemistry, Chem 281 and 282 Organic Chemistry and Stat 301 Statistics for Life Sciences, plus one each of: Calculus 1, Calculus 2, and Physics 1, Physics 2. Transfer students must ensure that the courses they take at a college will give them assigned credit for these exact courses.

Some disciplines are more prerequisite driven than others. Success in courses depends on the acquisition of critical knowledge and skills in prior courses. In the two examples given above, biology can be viewed in such a light. Success in history courses, on the other hand, may depend more on broad understandings related to how history is studied. Flexibility of courses in the pre-major, then, may be more appropriate and more feasible in some disciplines than in others. Since all approaches to requirements are based on what the student needs to know and be able to do, it may also be possible to use the specification of the requisite knowledge and abilities rather than course requirements as the basis of a more open and flexible pre-major.

### **Establishing a Common Flexible Pre-Major Across Institutions**

Each program/discipline in each institution establishes its own pre-majors. A key aspect of BCCAT's Flexible Pre-major Initiative is to investigate the feasibility of agreeing on a common Flexible Pre-Major which a *number* of institutions could adopt in lieu of their own requirements.

The following is an example of requirements for an entirely *fictitious* pre-major in Celtic Studies at five receiving institutions. It is presented to illustrate the variety of approaches that could be taken to constructing a flexible pre-major.

The table below illustrates how divergent the requirements in a single discipline can be from receiving institution to receiving institution. Apart from the 100 level introductory courses, it would be very difficult for a student to construct a transfer program that allowed any choice of receiving institution. Similarly, most sending institutions would be unable to offer the range of courses necessary to cover the differing requirements of the five receiving institution programs.

*Celtic Studies Pre-major at Five Institutions (a fictitious example).*

	University A	University B	University College X	University C	University College Y
<b>Required lower level courses for a degree in Celtic Studies at five BC degree-granting institutions</b>	CS 101/2 Intro to Celtic Studies CS 200 Celtic Languages & Linguistics Hist 280 Pagan Wales and Ireland Arch 290 Celtic Archaeology	CS 100 (6) Intro to Celtic Studies CS 150 (Gaelic) <u>or</u> CS 151 (Welsh) CS 230 The Celtic Calendar Soci 289 Celtic Social Structures	CELS 101/2 Intro to Celtic Studies Engl 250 Celtic Literature in Translation	CEST 100 (3) Intro to Celtic Studies CEST 200 Celtic Cultures and Societies. CEST 201 Celtic Mythology and Saga <u>or</u> CEST 250 Celtic Music and Dance	CS 101/102 Intro to Celtic Studies CS 150 (Gaelic I) <u>or</u> CS 151 (Welsh I) CS 160 (Gaelic II) <u>or</u> CS 161 (Welsh II) Anth 200 The Ancient Celts

**Working out Flexible Pre-Major Scenarios**

A Flexible Pre-major for Celtic Studies might look like one of the following scenarios ranging from totally flexible to one that is almost *standardized*.

Scenario 1 and 2 are flexible enough to permit students a choice of courses. They would also allow the sending institutions to offer locally developed courses, which may not fit the requirements at any of the receiving institutions. Note that the requirements are defined by broad description of content, rather than by a list of specific courses. Scenario 3 would require all sending institutions to deliver a similar curriculum, with some minor flexibility in the choice of language and in the choice of mythology versus literature, but no room for locally developed curriculum. A pre-major which has identical or close to identical requirements at a number of institutions is referred to as a *Standardized Pre-Major*. This option may be suited for disciplines which are highly pre-requisite driven, and for which the requirements are already very similar across institutions.

*Sample 15-Credit Flexible Pre-Major Scenarios for Celtic Studies*

	<b>Scenario 1: Totally Flexible Pre-Major</b>	<b>Scenario 2: Reasonably Flexible Pre-Major</b>	<b>Scenario 3: Least Flexible Pre-Major (almost <i>standardized</i>)</b>
<b>Required of all students: 15 credits</b>	<i>Required Knowledge and Abilities:</i> Basic understanding of Celtic cultures and languages (15 credits of lower division courses in Celtic Studies)	<p><i>A. Required Knowledge:</i> The basics of Celtic culture including language families, belief systems, social organization, geographical dispersion, archaeological evidence, historical evidence, modern Celtic movements. (6 credits of introductory courses)</p> <p><i>B. Abilities:</i> Basic competence in one Celtic language (one 3 credit course)</p> <p><i>C. Additional knowledge</i> Any other six credits in lower division Celtic Studies</p>	<p><i>A. Required Knowledge:</i> The basics of Celtic culture including language families, belief systems, social organization, geographical dispersion, archaeological evidence, historical evidence, modern Celtic movements. (6 credits of introductory courses)</p> <p><i>B. Abilities:</i> Competence in one Celtic language (two 3 credit courses)</p> <p><i>C. Additional knowledge:</i> 3 credits of Celtic mythology <u>or</u> Celtic literature</p>

Whichever pre-major approach was chosen, or deemed most appropriate, each institution would demonstrate how its Celtic Studies courses fit the requirements, and would provide to all other institutions, if necessary, a list of its courses that would satisfy the requirements of the pre-major. Receiving institutions would know that students were arriving with a reasonable background in Celtic Studies, although possibly not with the identical courses taken by direct-entry students or students who transfer before completing the Flexible Pre-major. The Pre-Major agreement would be published in the B.C. Transfer Guide so that the information is accessible to all students, advisors and institutions.

**Advantages of the Flexible Pre-Major Model**

A Flexible Pre-Major agreement has distinct advantages for students, sending institutions and receiving institutions. Transfer students can never be sure at which receiving institution they will be accepted. Since many, if not most, disciplines specify what courses must be taken by the second year, and since this can vary dramatically between institutions, students' choice of courses at a college can be difficult. If they change their mind about destination, or if they choose an institution for which their college is unable to offer all the required courses, they can encounter serious setbacks in their program of

studies. A Pre-Major agreement guarantees a student that he/she can accomplish all the lower level requirements for the degree before transfer to any one of the institutions which are signatories to that agreement.

One of the concerns of sending institutions is that having to meet the requirements of the receiving institutions leaves them no room for courses particularly suited to the geographic, social or economic climate of their locale. They express frustrations at their inability to take advantage of the expertise of their own faculty, or to introduce innovations appropriate to the needs of their own students. Each pre-major should allow room for at least one, and preferably more than one course which students can choose from the sending institution's list of offerings in that discipline. This **flexibility** must be one of the hallmarks of any pre-major agreement. An agreed description of the knowledge and capability of the student entering a major is one way to provide a common ground on which to establish an appropriately constrained, but maximally flexible pre-major requirements.

Accomplishment of the pre-major will ensure the receiving institution department that applicants have already made a commitment to the discipline and have the necessary background to be successful in third year. These factors may assist in the admission decision. Additionally, once a pre-major agreement is in place, receiving institutions can review their lower level programs and make changes in the requirements for direct entry students, without having to worry unduly about the effect of that on their feeder institutions. Currently, when a receiving institution department re-engineers its 100 and 200 level requirements, it is not uncommon that it then must request all sending institutions to resubmit their course outlines for re-evaluation and possible change of credit. The angst created in the system by such requests is often considerable.

### **Participation in Flexible Pre-Majors: from system wide to bilateral**

Because of institutional differences in approach to a discipline it is not always feasible to contemplate a pre-major that might be acceptable to *all* receiving institutions. Flexible Pre-Majors, therefore, could be classified in a number of ways, according to the number of institutions participating.

- a) System Wide Flexible Pre-Majors: Pre-Major agreements to which *all* the receiving institutions are signatories. This may be the most desirable type of pre-major from a student and sending institution point of view. A system wide agreement may be possible for those disciplines for which the lower level prerequisites to the major are already fairly similar across institutions. It may also be possible for those disciplines for which the lower level prerequisites are quite different, but in which success at the third and fourth year does not necessarily depend on the acquisition of exact content or skills in second year.
- b) Multi-lateral Flexible Pre-Majors: Pre-Major agreements to which *some* of the receiving institutions are signatories. Since deep curricular differences often exist between programs at different institutions that could preclude a system wide agreement, it is possible that several receiving institutions, but not all, may be able to enter into flexible pre-major agreements with sending institutions.

- c) Unilateral Flexible Pre-Majors: Pre-Major agreements between one receiving institution and its sending institutions. A precedent for this already exists in SFU's policy for transfer students intending to major in English. Transfer students with 18 or more credits in English must fulfill a less stringent set of requirements than must either direct entry students or students with fewer than 15 credits. Where curricular differences preclude a system wide or multilateral pre-major agreement, receiving institutions might consider adopting their own variant of the SFU model. One discipline may have multiple unilateral flexible pre-major agreements (a different one for each receiving institution) as long as each was not sufficiently incompatible with the others as to constitute no improved flexibility.

### **Caveat**

In some forms of transfer, such as block transfer, students who have completed a program of studies at a sending institution will be awarded a block of credits upon acceptance by the receiving institution, but no course-to-course equivalencies are established. However, under a Flexible Pre-Major agreement, students will continue to transfer on a course to course basis. Those students who have not completed the requirements of the Flexible Pre-Major (where such agreements exist) will be required to fulfill the normal lower level requirements of the discipline based on already established course equivalents. Maintaining **both** transfer options into the major will ensure flexibility and access for students.

## 2. Descriptive Pathways (All Programs)

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Attached are two sample “Descriptive Pathways” (following pages).

The first, labeled “Tri-University Block Transfer Agreement for Biological Sciences” and “Extension of Tri-University Block Transfer Agreement for Biological Sciences to Colleges” is essentially a transfer grid, displaying on one page all the detail regarding transfer in Biological Sciences in Alberta. This grid demonstrates transfer among the three universities and from all the colleges to the universities. The process followed in Alberta involved first establishing equivalencies between the universities, and then extending the resultant grid to the colleges. All courses were in place at all institutions: the exercise consisted of describing the equivalencies in each institution. Note that the block of courses is not complete at all colleges, and that a clear statement is made that admission is based upon performance, but that “successful completion of the above block of core courses along with appropriate options will allow transfer into third year at any participating university Biological Sciences program within the province.”

Prerequisite-driven pre-majors, or pre-majors where there is a high degree of similarity or standardization in the lower level requirements, may lend themselves to such a grid. For those disciplines for which it is not possible or feasible to agree on a flexible pre-major, such grids are a boon for students and advisors in providing clear information.

Also attached is part of a sheet developed by SFU’s PDP program that shows students which courses they can take at any sending institution in the province to satisfy entry requirements for the Teacher Education Program. Although this is not a single discipline grid it illustrates how programs can provide helpful information for transfer students in a compact format.

Transfer grids can also, if participants wish and if appropriate to the discipline, serve the purpose of establishing course equivalencies among **all** institutions, university to university, college to college, etc. Thus, transfer becomes a reciprocal or system-wide process, with all institutions agreeing on what courses are equivalent, rather than a bilateral process between one sending and one receiving institution.

Insert grid here

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insert grid here

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### **3. Block Transfer (Applied and Professional Programs)**

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Block Transfer is the process whereby a block of credits is granted to students who have successfully completed a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program. Block transfer has been used for many years in the B.C. post-secondary system to facilitate the transfer of professional and applied programs. For example, graduates of a two year college forestry diploma program, designed as a terminal, employment-oriented credential, might receive little or no credit towards a forestry degree on a course-to-course basis. However, under a bilateral block transfer agreement, students from several college diploma programs who have successfully completed the credential are eligible for either one or two years of credit towards forestry degrees at provincial universities. The content of first and second year courses at the sending and receiving institutions is sufficiently different so as to preclude the establishment of equivalencies and hence the granting of credit for individual courses. Nevertheless, an assessment of the entire diploma curriculum can establish whether the graduates are likely to possess the prerequisite knowledge, skills or abilities necessary for success in upper division courses.

There are currently about 300 block transfer agreements documented in the transfer guide. The following attempts to describe some of the models of block transfer currently in use in BC.

#### **Models of Block Transfer**

##### **1. *The 2+2 model***

- a) The receiving institution grants two full years towards a four year degree program, with no additional requirements. Students should be able to graduate in a total of four years, OR
- b) The receiving institution accepts a two year diploma for entry into a two year degree completion program. Royal Roads uses this model exclusively for some degrees.

##### **2. *The 2+2 provided that...model***

The receiving institution accepts a two year diploma for entry, provided that the diploma contains specified courses, or that specified standards or additional prerequisites (e.g. grade 12 math) have been met.

##### **3. *The 2+.5+1.5 model***

The receiving institution grants two full years towards the degree. However, because it judges the students' background to be deficient in some areas, it specifies courses that must be taken in the first semester of third year. Students should be able to graduate in a total of four years.

##### **4. *The 2+.5+2: The bridging model***

The receiving institution grants two years of credit for the diploma. However, because it judges the students' background to be deficient in some areas, it requires them to take a bridging course of one semester to upgrade their

knowledge and skills in those areas. Students should be able to graduate in a total of 4.5 years.

**5. *The 2+3 (or more) model***

The receiving institution grants one year of credit for completion of a two year diploma. Students can finish their degree in an additional three years after the diploma, or a total of five years. In some cases, receiving institutions will grant only a few credits for the completed diploma and in these cases it make take students up to six years to finish a degree.

**6. *The upside down model***

The receiving institution grants two years of credit for a diploma, but many of the courses taken in the diploma equate to upper division courses at the receiving institution. Students take their lower division general education courses in third and fourth year. Students should be able to graduate in a total of 4 years.

**7. *The good news/bad news model***

So called because, although students understand that they will receive two years of credit for their diploma, they find out upon transfer that few of those credits can be counted towards their degree. It may take students up to six years to complete their degree.

**8. *The 60 credit guarantee model***

In this model, receiving institutions guarantee students two years credit for a completed diploma, but they also establish equivalencies for as many courses as possible. Courses that have no equivalents are granted elective credit “within the block.” This means that as long as students have completed the block, all their courses will receive some form of credit at the receiving institution. This allows students to demonstrate that they have already taken prerequisites. As long as the diploma was reasonably similar to the lower levels of the receiving institution’s program, students should be able to graduate in four years or perhaps a little more.

**9. *The “course to course” within the block model***

A more liberal variant than model 8. Once the principle of block transfer has been agreed to, the receiving institution assesses all courses for equivalencies, and grants unassigned or elective credit to those courses for which there are no direct equivalents. All information is then submitted to the BC Transfer Guide. Thus, through this process, all courses in the diploma receive some form of documented credit. Students who transfer on a course-to-course basis also benefit through this arrangement. Students should be able to graduate in four years or perhaps a little more

**10. *Bilateral, multilateral models***

Although most block transfers consist of bilateral agreements between one sending and one receiving institution, there are some exceptions, such as:

- The Consortium model, where a group of receiving institutions will collaborate to agree on transfer criteria. A diploma that is acceptable to one member is acceptable to all members of the consortium.
- The Admissions model. See 1 a) above. In this case the receiving institution does not sign agreements with individual sending

institutions but rather announces that it will accept certain diplomas from *any* sending institution as part of an application process.

### ***11. The eclectic model***

Institutions or programs focused on student-centred and flexible admission policies may try to be as open as possible to maximizing transfer credit, and may grant blocks of credit for a variety of things, including previous degrees, diplomas or certificates, workplace or prior learning, or nontraditional accreditation. Students can often receive three years (or even more) of credit, and finish their degree by completing the minimum residency requirements of the institution.

### **Assessment of the “block” to be transferred**

Assessment methods vary as appropriate to the model in use. Some examples:

- Transfer is based on assumptions about the content of the diploma, and no real assessment of programs at individual institutions is attempted. For example, Royal Roads accepts applications from graduates of any Business Management Diploma Program from a BC public post-secondary institution as part of the application process to its business degree.
- Transfer is based on an in-depth assessment of individual courses within the diploma. The receiving institution is satisfied that they are substantially comparable to its own lower division requirements or offerings.
- Transfer is based on an in-depth assessment of the entire diploma. The receiving institution is satisfied that while individual courses do not match its own courses exactly, similar curriculum content is covered in the program.
- Transfer is based on an holistic assessment of the diploma or its outcomes. The receiving institution is satisfied that, while the content of the diploma may be quite different from its own lower level curriculum, graduates are likely to have the knowledge and abilities to be successful at the third year level.

In each of the above cases, where deficiencies are identified, receiving institutions may stipulate how and when students can acquire the missing content.